



U.S. Department  
of Education

# Dependent 2022-2023 Verification Worksheet Federal Student Aid Program



MOUNT ST. JOSEPH  
UNIVERSITY

Your application was selected for review in a process called verification. The law says that, before awarding federal aid, we have the right to ask you to confirm information reported on your Free Application for Federal Student Aid (FAFSA) using this worksheet and other required documents. If there are differences, your FAFSA information will be corrected. Authority to request and review information is provided under the financial aid program rules (34 CFR, Part 686). More info: <https://www.msj.edu/tuition-aid/policies-rules-regulations/verification/>

**Notice About Income Verification:** Income information for tax filers must be matched with data on file with the Internal Revenue Service (IRS). See page 2. As such, persons who have not filed their 2020 taxes\* will not be able to complete verification until they have filed and their tax information is available from the IRS. Availability of information for online IRS Data Retrieval or IRS Tax Return Transcripts can take up to 2 weeks of filing taxes electronically and up to 8 weeks following paper tax filing.

\*Persons filing a tax deadline extension will have to complete the verification process now and again after filing taxes.

You must complete and sign this worksheet.

*Non-scholarship aid will not be available until the verification process as outlined on this worksheet is complete. Preliminary Awards are estimates of eligibility. Any delay can cause the loss of eligibility or limited aid sources. Failure to complete verification prior to last day of enrollment can result in total loss of eligibility.*

## A. Student Information

Check one:  Incoming Freshman or Transfer Student  Continuing Student

_____	_____	_____	_____
Last Name	First Name	M.I.	MSJ ID #
_____			_____
Address (include apt. no.)			Date of Birth
_____			_____
_____	_____	_____	_____
City	State	ZIP Code	Phone Number (include area code)

## B. Family Information

List the people in your parents' household. Include:

- Yourself and your parent(s) (including stepparent) that you listed on the FAFSA even if you don't live with your parent(s).
- Your parent(s)' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2022, through June 30, 2023, or (b) the children would be required to provide parental information when completing a FAFSA for 2022-2023.
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2023.

Write the names of all household members. Also write in the name of the college for any household member, excluding your parent(s), who will be attending college at least half-time between July 1, 2022, and June 30, 2023, and will be enrolled in a degree, diploma, or certificate program.

If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be enrolled at least half-time?
Bill Miller (example)	18	Brother	State University	Yes
		Self	Mount St. Joseph University	

## Important Income Information for Tax Filers

**IRS DATA RETRIEVAL:** Best way to verify income is to use the IRS Data Retrieval Tool (IRS DRT) within FAFSA.

- Go to StudentAid.gov, log into your FAFSA record, select “Make FAFSA Corrections,” and navigate to the student and parent financial sections.
- If eligible to complete the process, use the IRS DRT to transfer 2020 IRS income tax information to the FAFSA for both student and parent.
- When using IRS DRT, do not modify income after transferring it to the FAFSA. If modified, Transcript option will be required.

**IRS TAX RETURN TRANSCRIPT:** If you are unable or choose not to use the IRS DRT, an IRS Tax Return Transcript will be required.

- Go to *IRS.gov* and use the “Order a Return or Account Transcript” link or call 1-800-908-9946.
- Make sure to request a 2020 *Return* Transcript, not an *Account* Transcript.
- SSN, date of birth, and address used on the taxes needed for each tax filer when making the request. IRS will only send transcripts to address on file.
- Married persons filing separate tax returns (or newly single who filed jointly) must use Transcript option to request tax info for both parents.
- Transcripts must be submitted with this verification worksheet.

**IRS TAX RETURN:** If you did not use the IRS DRT or provide a tax return transcript, a **signed** copy of your filed 2020 taxes including tax schedules is required.

## C. Student’s Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page and check only one of the boxes.

- IRS DRT in FAFSA on the Web was used to retrieve and transfer IRS income information for the student (either on the initial FAFSA or when making a correction) and no modification of the income data has since been made.
- Student unable or chooses not to use IRS DRT so 2020 IRS tax return transcript, or **signed** copy of 2020 federal tax return including tax schedules is attached.
- Student filed an amended return so the 2020 IRS tax transcript *and* 2020 **signed** copy of 1040X are attached.
- Student attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below.\*

2. **TAX RETURN NON-FILERS:** Complete this section if student will not file and is not required to file a 2020 income tax return with the IRS.

- Student not employed; no earned income in 2020.
- Student employed and completed info. Every employer, even if they didn’t issue a W-2, must be listed, and W-2s must be provided if issued.

Employer’s Name	2020 Income	W-2 Attached?
	\$	
	\$	
	\$	
	\$	

## D. Parent(s)’ Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page and check only one of the boxes.

- IRS DRT in FAFSA on the Web was used to retrieve and transfer IRS income information for the parent(s) (either on the initial FAFSA or when making a correction) and no modification of the income data has since been made.
- Parent(s) unable or choose not to use IRS DRT so 2020 IRS tax return transcripts, or copies of **signed** 2020 federal tax return(s) including tax schedules is attached.
- Parent(s) filed an amended return so the 2020 IRS tax transcript *and* 2020 **signed** copy of 1040X are attached.
- Parent(s) attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below.\*

2. **TAX RETURN NON-FILERS:** Complete this section if parent(s) will not file and are not required to file a 2020 income tax return with the IRS.

- Parent(s) not employed; no earned income in 2020.
- Parent(s) employed and completed info. Every employer, even if they didn’t issue a W-2, must be listed, and W-2s must be provided if issued.

Employer’s Name	2020 Income	W-2 Attached?
	\$	
	\$	
	\$	

## E. Certification and Signatures

By signing this worksheet, we certify that all the information reported on it is complete and correct. At least one parent must sign.

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Parent Date

**WARNING: If you purposefully give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

\*Extension filling will require the completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to Mount St. Joseph University.

**Office of Student Administrative Services**  
**Mount St. Joseph University**  
 5701 Delhi Road, Cincinnati, OH 45233-1670  
 Phone- (513) 244-4418  
 Fax- (513) 244-4201

**Do not mail this worksheet to the U.S. Department of Education.**  
 Mail, fax, or take it to Mount St. Joseph University.  
 You should make a copy of this worksheet for your records.